

S
346.786023
A3vh
2001

State of Montana

VENDOR HANDBOOK

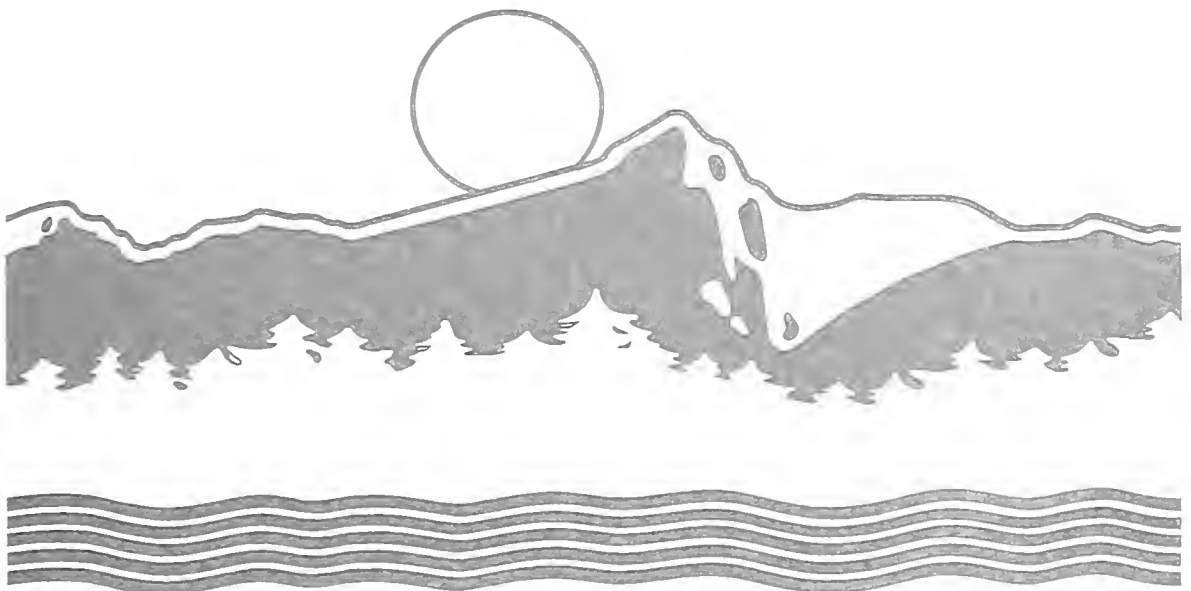
PROCUREMENT AND PRINTING DIVISION
DEPARTMENT OF ADMINISTRATION

STATE DOCUMENTS COLLECTION

JUN 14 2003

MONTANA STATE LIBRARY
1515 E. 6th AVE.
HELENA, MONTANA 59620

June, 2001



MONTANA STATE LIBRARY



3 0864 1001 7226 4

State of Montana

VENDOR HANDBOOK

ERRATA SHEET

Please make the following changes to the State of Montana, Vendor Handbook, issued June, 2001:

1. Pages 1, 3, and 6, change website address to: www.discoveringmontana.com/doa/ppd

2. Page 2, **TABLE OF CONTENTS**

Under **How the State of Montana Purchases:**

Change to Purchases Between \$5,001 and \$25,000 ("Limited Solicitation")

Change to Purchases Over \$25,000 (Formal Competitive Requirements)

3. Pages 4 and 5, **COMMONLY ASKED VENDOR QUESTIONS**

Under paragraph 2:

Change sentence to "In order to be aware of IFBs and RFPs over \$25,000 currently being solicited by the Procurement and Printing Division,"

Delete paragraphs 6 and 7 in their entirety.

Renumber paragraphs 8 and 9 to 6 and 7.

4. Page 6, **HOW TO REGISTER AS A VENDOR**

Under **Getting Selected to Receive Bids and Proposals:**

Change last sentence to read "Keep in mind however that all bids and proposals over \$25,000 are posted on our website at www.discoveringmontana.com/doa/ppd."

Under **Electronic Bid/Proposal Information:**

Change second sentence to read "The site lists all of the Procurement and Printing Division's current requests for bids and proposals over \$25,000."

5. Page 8, under **HOW THE STATE OF MONTANA PURCHASES:**

Change to Purchases Between \$5,001 and \$25,000 ("Limited Solicitation")

Change the first sentence to read "If the estimated value of the purchase is between \$5,001 and \$25,000, the individual"

Change to Purchases Over \$25,000 (Formal Competitive Requirements)

Change the first sentence to read "If the estimated value of the purchase will exceed \$25,000, a formal ..."

6. Page 10, under How the State Evaluates and Awards Bids:

Change the second paragraph to read:

"In a limited number of circumstances, contract awards may be impacted by the **reciprocal** preference established by state statute (Mont. Code Ann. § 18-1-102). The State of Montana applies a reciprocal preference against a vendor submitting a bid from a state or country that grants a residency preference to its resident businesses. A reciprocal preference is only applied to an Invitation for Bid for supplies and then only if federal funds are not involved. For a list of states and countries that grant residency preference, see the Procurement and Printing Division website at www.discoveringmontana.com/doa/ppd under Reciprocal Preference."

7. Page 12, under Bid/Proposal Submission Checklist:

Delete this bullet

- ◆ Include Montana-Made preference affidavit if applicable

8. On the included MONTANA RESIDENT PREFERENCE AFFIDAVIT at the end of the booklet, the shaded box at the top of the page is replaced to read as follows:

The following section should only be filled out by businesses physically located in Montana. In certain instances, the State of Montana applies a reciprocal preference against non-resident bidders located in certain states. Branch offices of a Montana resident business must submit a separate affidavit in order to qualify for the application of a reciprocal preference.

TO ALL INTERESTED VENDORS

Montana state government is one of the largest consumers of supplies and services in the state. This handbook is designed to acquaint you with the procedures governing the purchase of supplies and services by the State of Montana and to explain the standard terms and conditions applicable to the procurement process.

The Procurement and Printing Division of the Department of Administration has the overall responsibility for the procurement of supplies and services for state government. Building construction is the responsibility of the Architecture and Engineering Division within the Department of Administration (406) 444-3104; highway and bridge construction is managed through the Montana Department of Transportation (406) 444-6215.

The foundation of the state's procurement process for supplies and services is found in the Montana Code Annotated (Title 18) and the Administrative Rules of Montana (Title 2, chapter 5).

We encourage all qualified vendors to offer their supplies and services to the State of Montana. Our Internet site is located at www.state.mt.us/doa/ppd. We welcome your questions or comments.

Sincerely,

A handwritten signature in black ink, appearing to read "Marvin Eicholtz", with a stylized flourish at the end.

MARVIN EICHOLTZ

Administrator, Procurement and Printing Division

TABLE OF CONTENTS

Directory	3
Commonly Asked Vendor Questions	4
How to Register as a Vendor.....	6
The Vendor Registration Form	
Getting Selected to Receive Bids and Proposals	
Electronic Bid/Proposal Information	
New Product Line?? Address Change??	
How the State of Montana Purchases	8
Purchases of \$5,000 or Less ("Small Purchases")	
Purchases Between \$5,001 and \$15,000 ("Limited Solicitation")	
Purchases Over \$15,000 (Formal Competitive Requirements)	
Invitation for Bid (IFB)	
Request for Proposal (RFP)	
Contracting Methods Used by the State	
Special Procurement Situations	
How the State Evaluates and Awards Bids	
Payment	
How to Respond to Bids and Proposals	12
Bid/Proposal Submission Checklist	
Bid and Contract Performance Security	
General Information for Vendors	14
All-or-None Bids	Excise Taxes
Alternate Bids	Hazardous Chemical Information
Back Orders	Inspection
Bid Errors	Late Bids/Proposals
Cancellation of Bids and Proposals	New Products
Contract Agreement	Samples and/or Literature
Contractor Registration	Specifications
Correspondence Concerning Bids/Proposals	Vendor Protests
Default by Vendor	

DIRECTORY

Internet address: www.state.mt.us/doa/ppd

State Procurement Bureau

General Assistance	(406) 444-2575
Fax	(406) 444-2529
Street Address:	Room 165, Mitchell Building 125 North Roberts Street
Mailing Address:	PO Box 200135 Helena, MT 59620-0135

Property & Supply Bureau

General Assistance	(406) 444-4514 Ext. 0
Fax	(406) 444-4201
Street Address:	930 Lyndale Avenue
Mailing Address:	PO Box 200137 Helena, MT 59620-0137

Print & Mail Services

General Assistance	(406) 444-3053
Fax	(406) 443-2212
Street Address:	920 Front Street
Mailing Address:	PO Box 200132 Helena, MT 59620-0132

Regular office hours are Monday-Friday, 8 a.m. to 5 p.m., MST

COMMONLY ASKED VENDOR QUESTIONS

1. **Can't there be some exception for a late bid/proposal?** No. Even if the reason for the lateness of the submitted bid or proposal is beyond the control of the vendor, the bid/proposal will be rejected. Bids/proposals must be received at the proper address, by the time and date specified in the IFB or RFP. We encourage vendors to have their bid/proposal documents scheduled to *arrive at the designated location at least 24 hours in advance of the deadline to avoid problems such as flight or delivery delays*. If fax submissions are permitted, the entire document must be *received*, not just *transmitted*, by the designated time/date/place.
2. **Why didn't I receive a copy of your last bid/proposal?** Every vendor who registers with the State Procurement and Printing Division is placed on the State Vendors List. Because of the large number of vendors on the list, we mail bid/proposal requests to what we deem to be a sufficient number of vendors to ensure competition. Vendors are selected to be included in the mailing by specific request of an agency and by random selection. In order to be aware of the IFBs and RFPs over \$15,000 currently being solicited by the Procurement and Printing Division, vendors are encouraged to utilize our Internet site at www.state.mt.us/doa/ppd for the latest posting of bids and proposals.
3. **How can I see the results of a bid opening?** Award information is available from our Internet site at the address noted above. In addition, vendors are welcome to attend any bid opening and view the bids received. Vendors may also visit the state office responsible for the bid opening to review the bid tabulation sheets. Vendors interested in the results of a bid opening for contracted printing through the Print & Mail Services may submit a self-addressed, self-stamped envelope along with their bid.
4. **What information contained in my Request for Proposal response is available to my competitors?** Due to a ruling by the Montana Supreme Court in late May 1998, all of the contents of requests for proposals are open for public inspection with few exceptions. Proposal documents are considered "open" after the time set for receipt of the proposals. In addition, the public may attend all meetings of the evaluation committees. Only legitimate trade secrets (those meeting the requirements of Title 30, chapter 14, part 4, MCA) and certain financial information may be withheld from public inspection.
5. **Why can't I fax you a copy of my bid security?** Bid security and contract performance security instruments are only valid if a vendor submits an *original* document to us. A promise to submit the original document after the faxed copy is received by the deadline is not sufficient.
6. **My business is located in Montana, but it is incorporated in another state. Why don't I qualify for the Montana resident preference?** By statute until October 1, 2001, your business must be incorporated in Montana to qualify for the preference, regardless of the economic presence of your business. In addition, the law also prevents any wholly owned subsidiary of a non-Montana corporation from qualifying for Montana resident preference.

However, if the product you are submitting qualifies as "Montana-made," you will qualify as a Montana resident for that item. See section 18-1-103, MCA.

Keep in mind that the Montana preferences can only be applied in a *bid for goods* (not services) and then only when it does not involve *any* federal dollars and is not for a term contract. Preferences are not applied to Request for Proposals.

7. Do I need to have my claim for the Montana-made preference notarized *each* time I submit a bid? Yes, the law requires that an affidavit be submitted *each* time a claim for the "Montana-made" preference is made. Affidavits, by law, require a notary signature.

8. How and when does the State pay for its purchases not made with a charge card? By statute, the State has to pay for its purchases within 30 days, unless other provisions have been incorporated into the purchase order. The 30 days start running upon receipt of the supplies/services or upon receipt of a properly executed invoice, whichever is later. A state warrant is issued in payment of the supplies/services received. If you have any questions on payment, contact the agency listed on the purchase order.

9. How do agencies use your "charge card?" Montana state agencies are strongly encouraged to use the State's "pro-card" for purchases under \$5,000. Vendors accepting the card receive their payment within 72 hours compared to the 30 days mentioned above.

HOW TO REGISTER AS A VENDOR

The Vendor Registration Form

If you are interested in selling a supply or service (other than commercial printing) to the State of Montana, complete the enclosed Vendor Registration form and return it to: State Procurement Bureau, Dept. of Administration, Room 165 Mitchell Building, PO Box 200135, Helena MT 59620-0135. To complete the section titled "Vendor Quote Group Selection," refer to the Vendor Quote Groups/Items listing that identify the supplies or services you can provide to the State of Montana.

In order to do business with the State of Montana, individuals and businesses will be required to submit a federal identification number or their social security number to comply with IRS reporting requirements.

Please note that the State does not send out letters confirming vendor approval due to the large number of vendors requesting registration on our vendor list.

All questions regarding the State of Montana vendors list should be directed to bbelling@state.mt.us. Please include your company's name, address and federal identification number or social security number.

If you are interested in providing commercial printing to the State of Montana, please call (406) 444-3053 for a special registration form and process.

Getting Selected to Receive Bids and Proposals

Once a vendor's registration is received, the vendor will be placed on the State Vendors List. When the Procurement and Printing Division receives a purchase request from an agency, we will solicit bids and proposals from this list. However, being placed on the Vendors List does not mean that you will receive notification of *all* appropriate requests for bids or proposals. Due to the size of the list, the State Procurement Bureau will only solicit bids or proposals from a sufficient number of vendors to ensure adequate competition. Solicitations are sent to vendors specifically requested by the ordering agency; additional vendors are selected through the use of random selection procedures. Keep in mind however that all bids and proposals over \$15,000 are posted on our Internet site at www.state.mt.us/doa/ppd.

Electronic Bid/Proposal Information

We encourage vendors to utilize the State's Internet site to monitor state procurement needs. The site lists all of the Procurement and Printing Division's current requests for bids and proposals over \$15,000. By utilizing this system, vendors may learn of bids and proposals they did not initially receive. Questions regarding access to this system can be directed to (406) 444-2575 or e-mail bbelling@state.mt.us. Our Internet address is www.state.mt.us/doa/ppd.

New Product Line?? Address Change??

Any changes or additions to your Vendor Registration, such as change of address or an additional commodity to offer, requires a new application be completed.

HOW THE STATE OF MONTANA PURCHASES

The State of Montana has specific procurement procedures based on the estimated value and type of commodity being sought by the using agency.

Purchases of \$5,000 or Less ("Small Purchases")

If the estimated value of a purchase is \$5,000 or less, the individual agency may purchase the item directly from a vendor (unless the purchase involves printing or specific controlled commodities).

Purchases Between \$5,001 and \$15,000 ("Limited Solicitation")

If the estimated value of a purchase is between \$5,001 and \$15,000, the individual agency may purchase the item using informal documented competition. We encourage, but do not require, agencies to use our Vendors List for these purchases.

Purchases Over \$15,000 (Formal Competitive Requirements)

If the estimated value of the purchase will exceed \$15,000, a formal competitive method must be used to procure the item. The State of Montana utilizes two formal procedures -- an **Invitation for Bid (IFB)** or a **Request for Proposal (RFP)**.

Invitation for Bid (IFB)

An "Invitation for Bid" is used when a state agency knows precisely what supplies or services it wishes to purchase. The IFB will contain technical specifications and a formal bid closing date/time, which the vendor must comply with in order to be considered for award. Contracts, in most cases, are awarded to the bidder submitting the lowest, responsible bid price.

Interested vendors and the public are invited, but not required, to attend the formal opening of the bids at the time and place listed in the IFB. Normally, no decisions related to an award will be made at the bid opening in order to allow the State the opportunity to analyze the submitted bids for compliance with the specifications, terms, and conditions of the IFB.

Vendors are encouraged to visit the state office responsible for the bid opening to review the bid tabulation sheets. The State Procurement Bureau posts its contract awards on our Internet site at www.state.mt.us/doa/ppd. Commercial printers interested in bid tabulations submitted to Print & Mail Services should submit a self-addressed, self-stamped envelope with the bid submission.

Request for Proposal (RFP)

A "Request for Proposal" is typically used for complex procurements. It is often used when a state agency needs to consider factors, in addition to cost, in obtaining the required supply or service. The RFP will state the relative importance of all evaluation factors.

The RFP process permits at the State's discretion, negotiation of proposals, including prices. A formal proposal closing date/time will be specified.

Special Note: Vendors should be aware that due to a ruling by the Montana Supreme Court in late May 1998, all of the contents of requests for proposals are open for public inspection with few exceptions. Proposal documents are considered "open" after the time set for receipt of the proposals. In addition, the public may attend all meetings of the evaluation committees. Only legitimate trade secrets (those meeting the requirements) of Title 30, chapter 14, part 4, MCA) and certain financial information may be withheld from public inspection.

Contracting Methods Used by the State

There are three types of contracting methods used by the State in making purchases. The procurement official selects the appropriate contract method.

A **Purchase Order** is typically used when making a one-time purchase and formalizes the purchase transaction with a vendor. The purchase order will contain the quantity, description, and price of the supplies or services desired, applicable terms for payment, dates of performance, transportation terms, and any other factor pertinent to the purchase and its execution by the vendor.

A **State-wide Term Contract** is used for supplies or services commonly used by state agencies. These contracts are awarded by IFB or RFP for a specific period of time, with the ability to extend in annual intervals for a predetermined period. This extension is dependent on the agreement of both parties. The State issues both "exclusive" and "non-exclusive" term contracts.

"Exclusive term contracts" are "open-ended" and impose no obligation on the State other than the requirement to purchase whatever quantities as may be required during the period of the contract from the successful contractor(s), unless otherwise stated. Be sure to note that receipt of a contract does not authorize shipment; the contract holder may only ship after an order has been received from a state agency.

"Non-exclusive term contracts" are also "open-ended" but pose no obligation on the State to purchase from the successful contractor. However, we strongly encourage agencies to use these "non-exclusive term contracts" because of the ease of making a competitively priced purchase.

A **"Vendor Contract"** is the same as a state-wide term contract except that it is written exclusively for a particular agency or agencies.

Special Procurement Situations

Vendors should be aware of three additional procurement situations that occur in state government that may affect when you receive IFBs or RFPs and how you respond to them.

A "**Requisition Time Schedule**" is a purchasing technique that the State uses to consolidate some of its commodity needs into a scheduled buying period. For example, vehicles are purchased twice a year for all state agencies. Each agency's requirements are listed separately for separate delivery/billing.

A "**Cooperative Purchasing Agreement**" permits local governments, school districts, and some non-profit organizations to purchase from Montana state contracts. If non-state agencies choose to utilize the state contracts, they are responsible for issuing the purchase order and processing payment directly to the vendor. When responding to an IFB or RFP, vendors may have the opportunity to note whether or not their bid or offer will be extended to non-state agencies. To determine which entities are eligible to purchase cooperatively from state contracts, see "Cooperative Purchasing Organizations" at www.state.mt.us/doa/ppd.

"**Special agency purchases**" are those items delegated to particular state agencies to make without the involvement of the Procurement and Printing Division regardless of the cost. Some of these purchases, such as training, may be made without utilizing competitive procurement procedures. Other commodities, such as food and clothing for state institutions, are competitively procured directly by the agency. In addition, some state agencies have the responsibility of handling the competitive procurement of their supply or service needs up to a certain dollar limit.

How the State Evaluates and Awards Bids

In the case of an **Invitation for Bid**, the State will award a contract to the lowest responsible bidder meeting all of the criteria and specifications of the solicitation. However, the State reserves the right to reject any or all bids when it is in the best interest of the State.

In a limited number of circumstances, contract awards may be impacted by the **Montana resident or Made-in-Montana preference** established by state statute (Mont. Code Ann. §§ 18-1-102 and 18-7-107) which ranges from 3-5% for supplies and up to 8% for printing. These preferences are applied to the purchase of supplies (not services) which are procured through an IFB and then only if no federal funds or term contracts are involved.

Cash discounts offered by a vendor for quick payment are encouraged but the discounts are not considered in evaluating the bids.

In the case of a **Request for Proposal**, the contract is awarded based on the criteria stated in the RFP.

Payment

After delivery of the supplies or services, the vendor must submit three copies of the invoice to the "Bill To" agency specified on the purchase order. The invoice, packing lists, and any correspondence must reference the purchase order or contract number. All payment terms will be computed from the date of delivery of the goods or receipt of a properly executed invoice, whichever is later.

The State is allowed 30 days by statute to pay such invoices, unless other provisions have been incorporated into the purchase order.

When merchandise is received by the agency, it is inspected and checked against the specifications and a receiving report is prepared. The receiving report is matched with the vendor's invoice and the order form. If discrepancies are noted, the vendor will be contacted for correction.

In the instances involving purchases of \$5,000 or less, agencies may choose to utilize the State's "pro-card" in which case, payment is made by the card company to the vendor within 72 hours.

HOW TO RESPOND TO BIDS AND PROPOSALS

Vendors are encouraged to submit bids/offers for each IFB or RFP that they can supply in accordance with the specifications, terms, and conditions stated in the IFB/RFP. Bidders/offerors should carefully read the entire solicitation.

Currently, the State does not accept bids or proposals electronically. All bids must be submitted on the forms provided. The use of company bid forms containing terms and conditions, which are in conflict with those of the State, are not acceptable. The bid or proposal must be signed by an authorized representative. The bids and offers must be submitted in a sealed envelope or box with the IFB or RFP number and closing date in the upper left-hand corner just below the return address.

It is the vendor's responsibility to ensure that a bid or proposal is received by the issuing agency prior to the time and date specified. **Late bids will be rejected regardless of the degree of lateness or the reason for the delay, including causes beyond the control of the vendor.**

Facsimile copies of bids will be accepted only if they fully comply with all other conditions of the IFB and only if they are transmitted and received prior to the time and date set for receipt of bids. Facsimile copies of responses to an RFP will be accepted only on an exception basis with the *prior approval of the procurement official*.

Bids and proposals may be withdrawn prior to the bid/proposal opening time and date. Unless withdrawn, all submitted bids and proposals become the property of the State. Bids and proposals must be firm for 30 days, unless otherwise provided for in the IFB or RFP.

Bid/Proposal Submission Checklist

Below is a checklist to use when preparing a bid or proposal. The list includes common errors made by bidders and offerors responding to IFBs and RFPs. **Please note that these instructions do not contain all applicable requirements and careful reading of the IFB and RFP is critical.**

- ◆ Review all standard terms and conditions
- ◆ Properly identify return envelope or box
- ◆ Sign your bid or offer on the front page
- ◆ Initial any bid or offer changes you make
- ◆ Submit bid security (if requested)
- ◆ Include literature (if requested)
- ◆ List contractor registration (if requested)
- ◆ Review and complete all listed requirements
- ◆ Bid F.O.B. destination (Ship to: address) Freight prepaid
- ◆ Include Montana-Made preference affidavit if applicable
- ◆ Have current Montana resident preference affidavit in place if applicable
- ◆ Sign and return with bid/proposal, the Acknowledgement of Addendum (if any)

Bid and Contract Performance Security

Requiring security as a part of the bidding and award process is intended as protection for the State against the bad faith or failure of the bidders, offerors, and contractors. "Bid or proposal security" affords protection against a bid/offer being withdrawn after it has been opened. "Contract performance security" is required to provide for the fulfillment of the contract obligations.

If **bid or proposal security** is required, it will be stated in the IFB or RFP. The amount of security required is determined by the procurement official. At the time the bid or offer is submitted, the bidder or offeror must furnish the bid or proposal security in one of the following forms:

- ◆ A sufficient bond from a surety company licensed in Montana with a Best's rating of no less than A-;
- ◆ Lawful money of the United States;
- ◆ An irrevocable letter of credit not to exceed \$100,000, a cashier's check, certified check, bank money order, certificate of deposit, money market certificate, or bank draft that is drawn or issued by a federally or state-chartered bank or savings and loan association that is insured by or for which insurance is administered by the federal deposit insurance corporation or that is drawn and issued by a credit union insured by the national credit union share insurance fund.

All securities must be assigned only to the State of Montana, including certificates of deposit and money market certificates. All interest income from these certificates must accrue only to the contractor and not the State of Montana. **Facsimile copies of securities are not acceptable.** Negotiable securities will be returned to the unsuccessful vendors after the award is made.

If **contract performance security** is required, the successful bidder/offeror's bid or proposal security will be held until the appropriate contract security is received by the requesting agency. The amount of security required is determined by the procurement official. It is generally required on all construction contracts and on service contracts in which a part of the contract price is for the payment of labor.

The types of securities accepted for contract performance security are the same as those listed above. All contract performance securities must be assigned only to the State of Montana and remain in effect for the entire contract period, unless otherwise noted. Facsimile copies of the securities are not acceptable.

The security must provide that, if the bidder/offeror fails to perform any such obligations, the State of Montana may recover from either the bidder/offeror or the surety company (or both) all damages suffered because of the breach.

If contract security is required, the contractor may not start work until the security has been received and accepted.

GENERAL INFORMATION FOR VENDORS

All-or-None Bids: All-or-none bids may be considered if clearly in the best interest of the State. All-or-none bids must contain item-by-item prices.

Alternate Bids: Vendors may submit alternate bids (a bid on supplies other than specified). Alternate bids are considered only if the vendor is the lowest responsible vendor on their primary bid. Bids must be clearly identified as "Primary" and "Alternate."

Back Orders: If it is necessary to back order any item, the vendor must notify the receiving agency and advise them of the expected delivery or shipment date. If this date is not acceptable, the State may seek remedies for default.

Bid Errors: Prior to the opening of a bid or proposal, errors may be corrected by lining out and entering the substituted words or figures and initialed by the person signing the bid. No bid/proposal may be altered or amended after the bid/proposal opening. In the case of errors in the extension of a price, the unit price will prevail.

Cancellation of Bids and Proposals: The procurement official may cancel an IFB or RFP at any time.

Contract Agreement: The vendor's signature on the bid or proposal constitutes an offer to sell under the terms and conditions contained in the bid or proposal. The delivery of a State of Montana Purchase Order or Term Contract with the valid signature of the procurement official constitutes acceptance of the offer to sell and consummates the binding contractual agreement.

Contractor Registration: Contractors may be required to register with the Montana Department of Labor and Industry. If a particular bid or proposal requires such registration, please contact the Montana Department of Labor and Industry at (406) 444-7734.

Correspondence Concerning Bids/Proposals: Any questions concerning an IFB or RFP should be directed to the procurement official whose name and phone number appears on the IFB or RFP and include the bid or proposal number and the opening date as stated.

Default by Vendor: In the case of any default of the vendor, the State of Montana may procure the supply or service from other sources and hold the vendor responsible for any damages incurred including, but not limited to, excess costs or handling charges. The State has the right to remove any vendor from the Vendors List who defaults on a contract with the State.

Excise Taxes: The State of Montana is exempt from Federal Excise Taxes (#81-0302402).

Hazardous Chemical Information: Vendors must provide one set of appropriate Material Safety Data Sheets (MSDS) and container labels upon delivery of all hazardous chemicals. All Material Safety Data Sheets and labels must be in accordance with the Occupational Safety and Health Administration's "Hazard Communication Rule."

Inspection: All supplies are subject to inspection and testing. Items that do not meet specifications will be rejected. Failure to reject upon receipt, however, does not relieve the vendor of liability. When subsequent tests after receipt are conducted and when such tests reveal failure to meet specifications, the State may seek damages regardless of whether part or all of the merchandise has been consumed.

Late Bids/Proposals: Regardless of cause, late bids and proposals will not be accepted and will automatically be disqualified from further consideration. It shall be the vendor's sole risk to assure delivery at the designated office by the designated time. Late bids and proposals will not be opened and may be returned to the vendor at the expense of the vendor or destroyed if requested.

New Products: All supplies and services offered and furnished must be new and of current production unless the IFB or RFP specifically allows otherwise. Re-manufactured or re-furbished supplies are not considered new.

Samples and/or Literature: Any samples or descriptive literature requested in the IFB or RFP must be provided free of charge. Samples, which are not destroyed by testing, may be returned at the vendor's expense upon request. Samples submitted by successful bidders/offerors may be kept for the contract duration for comparison of shipments received.

Specifications: The procurement official assumes that a vendor is bidding in strict accordance with the specifications in the IFB. Any exceptions to the bid must be clearly indicated. Exceptions may be rejected. Merchandise received that does not meet the specifications will be returned at the vendor's expense.

Vendor Protests: To file a protest, bidders and offerors must notify the department no later than the close of business 14 calendar days after the execution of a contract. The protest must be in writing and state in detail all of the protestor's objections. If the 14th day falls on a Saturday, Sunday or legal holiday, the protest is due at the end of the next business day. In return, the department must conduct an internal review of the protest and notify the protestor in writing of the findings within 30 days of the receipt of the protest. If the decision of the department is not satisfactory, the bidder or offeror may pursue a contested case hearing within 14 days of the protest decision, pursuant to the Montana Administrative Procedures Act. It is important to note that in the event of a protest, contested case hearing or judicial review, the State is under no obligation to delay, halt, or modify the procurement process. Monetary damages of any sort are not permitted per section 18-4-242, MCA.

MONTANA RESIDENT PREFERENCE AFFIDAVIT

The following section should *only* be filled out by businesses *physically located in Montana*. If the residency requirements of Section 18-1-103 of the Montana Code Annotated are met, Montana businesses will receive a preference when bidding on certain supplies for public agencies. Branch offices of a Montana resident business *must* submit a separate affidavit in order to qualify for the preference.

Type of Business Enterprise: (Check and complete **ONLY ONE** applicable section)

☐ Individual

Name: _____

Address: _____

Have you been a resident of Montana 12 months prior to bidding? ☐ Y ☐ N

☐ Partnership or Association

List all names and addresses of all Montana resident partners or members. (Use additional sheets as necessary)

Name: _____ Name: _____

Address: _____ Address: _____

Have the majority of partners or members been residents of Montana for the last 12 months? ☐ Y ☐ N

☐ Limited Liability Company

List all names and addresses of all Montana resident members. (Use additional sheets if necessary)

Name: _____ Name: _____

Address: _____ Address: _____

Have the majority of all members been residents of Montana for the last 12 months? ☐ Y ☐ N

☐ Corporation

State of Incorporation _____

Is your company a wholly owned subsidiary of a non-Montana corporation? ☐ Y ☐ N

Note: Only companies incorporated in Montana and not wholly owned by a non-Montana corporation are eligible to receive the Montana resident preference per Section 18-1-103, MCA.

I, _____ (name), being first duly sworn, depose and say: That I am the _____ (individual, partner, officer of corporation, or association officer) of the above named business, and I have read the above and the information contained herein is true to the best of my knowledge, information, and belief.

Signed: _____

Subscribed and sworn to before me this _____ day of _____, _____

Name of Notary _____

Residing at _____

My Commission Expires _____

For State Use Only

Preference: ☐ Y ☐ N Initial _____ Date _____

MONTANA RESIDENT PREFERENCE AFFIDAVIT

The following section should *only* be filled out by businesses *physically located in Montana*. If the residency requirements of Section 18-1-103 of the Montana Code Annotated are met, Montana businesses will receive a preference when bidding on certain supplies for public agencies. Branch offices of a Montana resident business *must* submit a separate affidavit in order to qualify for the preference.

Type of Business Enterprise: (Check and complete **ONLY ONE** applicable section)

☐ Individual

Name: _____

Address: _____

Have you been a resident of Montana 12 months prior to bidding? ☐ Y ☐ N

☐ Partnership or Association

List all names and addresses of all Montana resident partners or members. (Use additional sheets as necessary)

Name: _____ Name: _____

Address: _____ Address: _____

Have the majority of partners or members been residents of Montana for the last 12 months? ☐ Y ☐ N

☐ Limited Liability Company

List all names and addresses of all Montana resident members. (Use additional sheets if necessary)

Name: _____ Name: _____

Address: _____ Address: _____

Have the majority of all members been residents of Montana for the last 12 months? ☐ Y ☐ N

☐ Corporation

State of Incorporation _____

Is your company a wholly owned subsidiary of a non-Montana corporation? ☐ Y ☐ N

Note: Only companies incorporated in Montana and not wholly owned by a non-Montana corporation are eligible to receive the Montana resident preference per Section 18-1-103, MCA.

I, _____ (name), being first duly sworn, depose and say: That I am the _____ (individual, partner, officer of corporation, or association officer) of the above named business, and I have read the above and the information contained herein is true to the best of my knowledge, information, and belief.

Signed: _____

Subscribed and sworn to before me this _____ day of _____, _____

Name of Notary _____

Residing at _____

My Commission Expires _____

For State Use Only

Preference: ☐ Y ☐ N Initial _____ Date _____

STATE OF MONTANA

VENDOR QUOTE GROUP DIRECTORY

JUNE, 2001

01	Agricultural	18	Fencing	36	Printing
02	AC/Heating	19	Financial Services	37	Professional Services
03	Aircraft	20	Fire Protection	38	Recording Devices
04	Appliances	21	Foods	39	Records Management
05	Bookbinding	22	Forest Related Services	40	Recreational/Sports
06	Building & Construction	23	Fuel/Energy	41	Road Construction
07	Building Maintenance	24	Furniture	42	Safety
08	Clothing & Shoes	25	Grounds Maintenance	43	Security
09	Communications	26	Health Related	44	Signage
	Equipment & Services	27	Kitchen	45	Storage Tanks & Related
10	Computer Equipment	28	Laboratory	46	Testing Equipment
11	Computer Services	29	Law Enforcement	47	Tools
12	Containers	30	Livestock, Fish & Game	48	Training
13	Cosmetology	31	Media Communications	49	Vehicles
14	Dry Goods (Textiles, Linens, etc.)	32	Musical	50	Vending
15	Educational	33	Nursery	51	Water Equipment
16	Engineering	34	Office Supplies & Equipment	52	Welding
17	Environmental Services	35	Photographic		

Vendor Quote Groups/Items

01	<u>AGRICULTURAL</u>	<u>06</u>	<u>BUILDING & CONSTRUCTION</u>	<u>09</u>	<u>COMMUNICATIONS</u>
0101	Agricultural Chemicals	0601	Bricks	0901	<u>EQUIPMENT & SERVICES</u>
0102	Agricultural Supplies	0602	Doors/Hardware	0901	Audio/Visual Equipment
0103	Agricultural Services	0603	Electrical Supplies	0902	Cellular Services
		0604	Floor Coverings	0903	Facsimile Machines/Services
		0605	Glass	0904	Paging Services
02	<u>AC/HEATING</u>	0606	Construction/Other Supplies	0905	Radio Systems
0201	AC/Heating Devices	0607	Paint/Varnish & Supplies	0906	Communications Equipment
0202	AC/Heating Accessories	0608	Plumbing Supplies	0907	Supplies
0203	AC/Heating Systems	0609	Prefabricated Buildings	0907	Communications Equipment
0204	Air Conditioners	0610	Roofing	0908	Services
0205	Chillers	0611	Septic Supplies & Systems	0908	Telemetry Equipment
0206	Fans	0612	Building & Construction Services	0909	Telephone Equipment
0207	Furnaces/Boilers	0613	Water Supplies & Systems	0910	Telephone Systems
0208	AC/Heating Services	0614	Windows	0911	Communications Services
		0615	Wood		
		0616	Window Coverings	10	<u>COMPUTER EQUIPMENT</u>
03	<u>AIRCRAFT</u>	07	<u>BUILDING MAINTENANCE</u>	1001	Mainframe Computers
0301	Aircraft Equipment/Parts	0701	Elevator Maintenance	1002	Computer Maintenance
0302	Helicopters	0702	Elevator Supplies	1003	PCs & Peripherals
0303	Airplanes	0703	Equipment	1004	Printers
0304	Aircraft Repair/Maintenance	0704	Garbage Services	1005	Computer Software
0305	Pilot Services	0705	Janitorial Services	1006	Computer Supplies
04	<u>APPLIANCES</u>	0706	Building Supplies	11	<u>COMPUTER SERVICES</u>
0401	Commercial Appliances	0707	Building Maintenance	1101	Data Entry
0402	Kitchen Appliances	0708	Warehouse Equipment/Supplies	1102	Computer Management
0403	Laundry Appliances	0709	Janitorial Supplies	1103	Network Cabling
0404	Appliance Repair/Services			1104	Computer Programming
0405	Laundry Supplies	08	<u>CLOTHING & SHOES</u>	1105	Software Development
05	<u>BOOKBINDING</u>	0801	Disposable Clothing & Shoes		
0501	Bookbinding Supplies	0802	Clothing & Shoe Services		
0502	Bookbinding Services	0803	Clothing & Shoe Supplies		
		0804	Specialized Clothing & Shoes		
		0805	Uniforms		

Vendor Quote Groups/Items

12 <u>CONTAINERS</u> 1201 Barrels 1202 Cardboard Containers 1203 Metal Containers 1204 Plastic Containers 1205 Wood Containers	17 <u>ENVIRONMENTAL SERVICES</u> 1701 Controlled Burning 1702 Drilling 1703 Environmental Assessments 1704 Environmental Studies 1705 Hazardous Materials 1706 Landfill 1707 Mining 1708 Radon Testing 1709 Reclamation Abandoned Oil/Gas 1710 Reclamation Abandoned Water 1711 Recycling 1712 Septic Services 1713 Spraying (Insect & Rodents) 1714 Stream Restoration 1715 Waste System Analysis 1716 Water Treatment 1717 Weed Spraying	20 <u>FIRE PROTECTION</u> 2001 Fire Protection Equipment 2002 Fire Protection Supplies 2003 Fire Protection Services
13 <u>COSMETOLOGY</u> 1301 Cosmetology Equipment 1302 Cosmetology Supplies 1303 Cosmetology Testing		21 <u>FOODS</u> 2101 Meats 2102 Non-Perishable 2103 Food Services
14 <u>DRY GOODS (TEXTILES, LINENS, ETC.)</u> 1401 Dry Goods Supplies		22 <u>FOREST RELATED SERVICES</u> 2201 Logging/Cutting/Thinning 2202 Plotting 2203 Tree Planting 2204 Studies 2205 Surveying
15 <u>EDUCATIONAL</u> 1501 Educational Materials 1502 Educational Services 1503 Educational Testing	18 <u>FENCING</u> 1801 Electrical Fencing 1802 Metal/Wire Fencing 1803 Fencing Services 1804 Fencing Supplies 1805 Wood Fencing	23 <u>FUEL/ENERGY</u> 2301 Electricity 2302 Fleetcard Services 2303 Natural Gas 2304 Propane 2305 Fuel/Energy Services 2306 Solar Energy 2307 Fuel/Energy Equipment & Supplies 2308 Bulk Gasoline/Diesel
16 <u>ENGINEERING</u> 1601 Engineering Supplies 1602 Engineering Equipment 1603 Engineering Services	19 <u>FINANCIAL SERVICES</u> 1901 Banking 1902 Bonding 1903 Collection 1904 Financing 1905 Investments 1906 Procurement/Credit Cards 1907 Statistical 1908 Insurance	

Vendor Quote Groups/Items

24 FURNITURE

2401 Custom Furniture
2402 Hospital Furniture
2403 Laboratory Furniture
2404 Metal Furniture
2405 Modular Furniture
2406 Furniture Repairs
2407 Wood Furniture
2408 Mattresses

25 GROUNDS MAINTENANCE

2501 Chemical Deicer
2502 Grounds Equipment
2503 Grounds Supplies
2504 Grounds Maintenance
2505 Parking Lot Maintenance
2506 Snow Removal

26 HEALTH RELATED

2601 Audiology
2602 Dental
2603 Drug & Alcohol Testing/Supplies
2604 Health Facilities Management
2605 Hospital Equipment
2606 Hospital Supplies
2607 Institutional Equipment
2608 Institutional Supplies
2609 Medicaid Analysis & Audit
2610 Medicaid Billing
2611 Medical Services
2612 Medical Research
2613 Nursing
2614 Paternity Testing
2615 Pharmaceuticals
2616 Health Related Supplies

27 KITCHEN

2701 Dishes
2702 Disposable Dishes/Utensils
2703 Kitchen Equipment
2704 Kitchen Utensils/Supplies

28 LABORATORY

2801 Laboratory Chemicals
2802 Laboratory Equipment
2803 Laboratory Supplies
2804 Laboratory Services

29 LAW ENFORCEMENT

2901 Law Enforcement Equipment
2902 Law Enforcement Supplies

30 LIVESTOCK, FISH & GAME

3001 Animals/Fish
3002 Game Damage Services
3003 Livestock Equipment
3004 Livestock Food
3005 Livestock Supplies
3006 Livestock Services

31 MEDIA COMMUNICATIONS

3101 Media Advertising
3102 Film & TV Production
3103 Public Relations
3104 Telemarketing
3105 Convention/Trade Show Materials

32 MUSICAL

3201 Musical Equipment
3202 Musical Services
3203 Musical Supplies

33 NURSERY

3301 Plants/Trees
3302 Nursery Equipment
3303 Nursery Supplies
3304 Specialized Nursery
3305 Nursery Services

34 OFFICE SUPPLIES & EQUIPMENT

3401 Duplication Equipment
3402 Office General Supplies
3403 Ink Products
3404 Mailroom Equipment/Supplies
3405 Office Mechanical Equipment
3406 Office Paper Products
3407 Office Equipment Maintenance
3408 Photocopiers

35 PHOTOGRAPHIC

3501 Photographic Equipment
3502 Photographic Supplies
3503 Photographic Maintenance

Vendor Quote Groups/Items

36	PRINTING	SPECIALTY	
		PRODUCTS/SERVICES	
36	PRINTING	COMMERCIAL PRINTING	
		360101	Quick Print, Duplicating
		360102	Class 1-Flat
		360103	Class 2-Finished
		360104	Class 3-Bound
		360105	Class 4-Long Run-High Quality
		360106	Income Tax Booklet
		360107	College Catalogs
		360108	Newspapers, Tabloids
		360109	Laws
		360110	Map Printing
		360111	Art Reproductions
36	PRINTING	FORMS	
		360201	Continuous Forms (Computer Forms)
		360202	Data Mailers
		360203	Unit Set Forms
		360204	Tiles and Certificates
		360205	Optical Read Forms
		360206	Checks
		360207	Tax Forms
		ENVELOPES	
		360301	Commercial Envelopes
		360302	Custom Envelopes
		360303	Catalog, Clasp, Inter-office, Coin Envelopes
		360304	Tyvek Envelopes
		360305	Invitation, Announcement, Cabinets
		360306	Shipping Tags
36	PRINTING	DECALS	
		360401	Self Adhesive Decals
		360402	Gummed Decal
		360403	Water Soluble Decal
		360404	Pre-Printed Address Labels
		360405	Validation Decals
		BINDERS/FOLDERS	
		360501	Poly Vinyl Binders
		360502	Polyethylene Binders
		360503	Press Board Binders
		360504	Tabbed Dividers
		360505	Portfolio Covers
		360506	Pad Holder
		360507	File Folders & Jackets
36	PRINTING	TICKETS	
		360601	Booked Tickets
		360602	Event Tickets
		360603	Passes
		PRODUCTS/SERVICES	
		360701	Grocery or Merchandise Paper Bags
		360702	Prescription Bags
		360703	Plastic Bags
		360704	Corrugated Boxes/Paper Boxes
		360705	Credit/I.D. Cards
		360706	Diplomas and Diploma Cases
		360707	Napkins
		360708	Fleet Signs
		360709	Laboratory & Hospital Tapes & Labels
		360710	Cartography
		360711	Diazo Reproduction
		360712	Foil Stamping and Embossing
		360713	Silk Screening
		360714	Spiral Binding
		360715	Laminating
		360716	Calligraphy
		360717	Composition/Prepress
		360718	Illustrative Art (Line)
		360719	Fine Art
		360720	Labeling/Mailing
		360721	Engineering Photo Copying
		3608	Supplies
		3609	Equipment
		3610	Printing Equipment Maintenance

Vendor Quote Groups/Items

37	<u>PROFESSIONAL SERVICES</u>	38 <u>RECORDING SERVICES</u>	43 <u>SECURITY</u>
3701	Accounting Services	3801 Amplification Devices	4301 Armed Security
3702	Actuarial Services	3802 Recording Device Controls	4302 Mobile Security
3703	Architecture Services	3803 Logging Devices	4303 Security Equipment/Supplies
3704	Auctioneering Services	3804 Scale Devices	4304 Security Systems
3705	Auditing Services	3805 Surface Recording Devices	
3706	Business Management Services	3806 Weather Devices	
3707	Claims Adjuster Services		
3708	Economic Services	39 <u>RECORDS MANAGEMENT</u>	44 <u>SIGNAGE</u>
3709	Energy Assessment	3901 Records Management Equipment	4401 Badges
3710	Facilitators	3902 Records Management Supplies	4402 Building Signs
3711	Flagging Services	3903 Records Management Services	4403 Highway Signs
3712	Food Stamp Issuance		4404 Sign Maintenance
3713	Grant Writing		4405 Sign Materials
3714	Hearings Officer Services	40 <u>RECREATIONAL/SPORTS</u>	4406 Mechanical Signs
3715	House/Building Moving	4001 Recreational/Sports Equipment	4407 Sign Services
3716	Legal Services	4002 Recreational/Sports Supplies	4408 Traffic Control Equipment (All Types)
3717	Market Research Services	4003 Recreational/Sports Services	4409 Traffic Control Equipment Maintenance
3718	Mass Transportation	4004 Campground Equipment/Supplies	
3719	Mobile Home Transport		
3720	Moving/Relocation	41 <u>ROAD CONSTRUCTION</u>	45 <u>STORAGE TANKS & RELATED</u>
3721	Polling Services	4101 Aggregate	4501 Fiberglass Storage Tanks
3722	Private Investigator Services	4102 Asphalt	4502 Fuel Dispensing Equipment
3723	Process Servers	4103 Asphalt Mix Materials	4503 Storage Tank Maintenance
3724	Real Estate Appraisal Services	4104 Road Construction Equipment	4504 Metal Storage Tanks
3725	Surveyor Services	4105 Road Construction Materials	4505 Removable Storage Tanks
3726	Temporary Employment	4106 Road Construction Maintenance	4506 Storage Tank Services
3727	Transportation Hazards	4107 Traffic Line Markings	4507 Underground Storage Tanks
3728	Veterinarian Services		
3729	Editing & Writing	42 <u>SAFETY</u>	46 <u>TESTING EQUIPMENT</u>
3730	Graphic Arts/Publishing	4201 Safety Equipment	4601 Testing Equipment
3731	Mediation Services	4202 Safety Supplies	4602 Testing Equipment Maintenance
		4203 Safety Services	4603 Testing Equipment Supplies
			4604 Testing Equipment Services

Vendor Quote Groups/Items

47	<u>TOOLS</u>
4701	Carpentry Tools
4702	Heavy Construction Tools
4703	Mechanical tools
48	<u>TRAINING</u>
4801	Training Materials
4802	Training Services
49	<u>VEHICLES</u>
4901	ATV/Snowmobiles & Equipment
4902	Boats/Motors
4903	Cars, Trucks, Vans
4904	Heavy Duty Trucks>1 Ton
4905	Heavy Equipment
4906	Implement, Agriculture & Accessories
4907	Mass Transportation
4908	Motorcycles
4909	Repairs/Maintenance
4910	Trailers (All Types)
4911	Shop Equipment
4912	Specialized Vehicles
4913	Vehicle Accessories
4914	Vehicle Light Bars
50	<u>VENDING</u>
5001	Amusement Vending
5002	Food & Beverage Vending
5003	Vending Services/Maintenance

51	<u>WATER</u>
5101	Water Coolers
5102	Drinking Water Systems
5103	Irrigation Systems, Pumps
5104	Water Pumps
5105	Water Purification
5106	Water Services
52	<u>WELDING</u>
5201	Welding Equipment
5202	Welding Supplies

State of Montana
State Procurement Bureau
Procurement & Printing Division
Department of Administration
PO Box 200135
Helena MT 59620-0125

Return Service Required